ONBOARDING TOOLKIT

FOR UW MANAGERS

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Dear Manager,

Congratulations on the successful hire of your new employee! We look forward to being part of their onboarding process through their in-person Welcome Day orientation.

This is an exciting time for you and your new employee, but it is only the beginning. Research shows that providing onboarding throughout an employee's first 90 days greatly increases their retention and productivity. In addition to Welcome Day orientation, there are many activities and processes that can help your employee feel welcomed and supported.

This Onboarding Toolkit provides checklists for you and your employee, as well as suggestions for how to develop and maintain a successful relationship. It also provides suggestions for developing your internal onboarding process.

Feel free to contact us for help at 206-543-1957 or pod@uw.edu.

Happy onboarding,
Professional & Organizational Development

WHAT IS ONBOARDING?

- Brings your newly hired talent up to speed with the policies, processes, culture, expectations and day-to-day responsibilities of your unit.

- Ensures new employees feel welcome and excited, confirming why they joined your unit and the University of Washington.

WHY IS ONBOARDING IMPORTANT?

- Builds the UW's and your unit's reputation for being a great employer to work for, with great training, clear leadership and a strong organization.

- Helps you retain your staff members.

- Reduces high turnover costs.

- Increases staff engagement and productivity.

- Builds a cohesive team and fosters collaboration.

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Before the First Day
This checklist provides suggestions and ideas for you to set the stage for your employee's success.

New Employee Checklist
This is your go-to list for the initial information new employees should receive. It's recommended that you and your employee sign the checklist to confirm that they received necessary information. Keep the signed copy on file.

Mentor Checklist
Delegate some onboarding tasks by assigning the new employee a mentor — someone who knows the ropes and can be a positive role model. Having a mentor also provides new employees with a "safe" person to go to with questions they don't want to bother you with or want to ask without jeopardizing your confidence.

Manager's Onboarding To-Do List
Although some items can be delegated to a new employee's colleague or mentor, there are a number of tasks that you as a manager should accomplish over the employee's first 90 days.

New Employee Check-In Meeting Questions
It's strongly recommended that you meet regularly with your new employee and allow time for questions, information sessions and training. These sample questions give you a good starting point for what to ask as you continue to meet with your new employee and ensure their success.

New Employee Success Profile
Success is sometimes hard to gauge, especially from a new employee's perspective. Use this profile to identify and share your expectations and vision of success for a new employee's first 30, 60 and 90 days. Talking about what success looks like helps your new employee set goals and priorities and can determine what on-the-job training may be needed.

Recognition Profile
This tool allows you to solicit information so that you can ensure any recognition given is on target — meaningful, comfortable and personal for the new employee. Sharing this tool also communicates that recognition is important to your work group and the UW.

Onboarding Mistakes to Avoid
A helpful list of what NOT to do in the onboarding process.

BEFORE THE FIRST DAY

Consider the following steps to build a positive relationship with your new employee. The ideas below will ensure that the connection you build with your new employee is strong from the start.

- ☐ Send an official hire letter outlining the specifics of the employee's position, including reporting relationship, salary, etc. View sample hire confirmation letters at: **hr.uw.edu/forms**

- ☐ Stay in regular communication with your employee if there is a long period of time between the offer and the start date. Send a packet of introductory information about your unit and the University.

- ☐ Send an informal announcement to your unit about their new team member and their background.

- ☐ Meet with your unit HR or your payroll coordinator to learn what paperwork a new hire needs to complete.

- ☐ Shortly before the start date, send your new employee an email that includes the following:

  - ☐ Date and time to arrive the first day

  - ☐ What to bring on the first day (to complete the I-9 and W-4 forms), see: **isc.uw.edu/your-pay-taxes/tax-filing-resources**

  - ☐ Where to report and who to ask for upon arrival

  - ☐ Transportation and/or parking information

  - ☐ What to expect during the first days on the job (include a schedule of the first few days if possible)

  - ☐ What to wear

  - ☐ Options for lunch (better yet, arrange to take them out to lunch with you and/or a group of colleagues)

- ☐ Select one of your staff members to be a mentor for your new hire's first few months.

- ☐ Encourage your staff to send welcome emails to your new hire.

- ☐ Set up appointments with individuals that your new employee should meet.

☐ Set aside time in your calendar to make sure you're available for your new employee's first days and weeks.

☐ Set up your new employee's workstation, including their desk and/or office computer. Provide a clean desk in a cubical or office that is in "move-in" condition.

☐ Include a welcome sign on the new staff member's door or workstation.

☐ Set up phone(s): Determine if your new employee will need a new phone, or have an existing one reconfigured. Also be sure that their **new voicemail box** is set up on the employee's first work day.

☐ Have building keys or other access methods ready.

☐ Make sure necessary supplies are available. Plan ahead to ensure that new employees have all the required office supplies on their first day, including pens, paper, post-its, message pads, office keys, etc.

☐ Order business cards if necessary/possible. UW Creative Communications has a **web-based ordering process.**

☐ Make sure new staff members are added to appropriate email lists and calendar systems.

☐ Create a first-week schedule for new employees so that they have something to do that is meaningful and helps them hit the ground running. The schedule should include a balance of time with others, down time, and time on their own to read orientation materials or complete other orientation-related tasks. *Consider including some or all of the following:*

  ☐ Designated time for the new employee to attend Welcome Day orientation if they are a benefits-eligible staff member working on our Seattle campus. Faculty on the Seattle campus and employees with the medical centers, UW Bothell and UW Tacoma should attend the orientations hosted by their organizations; those employees may attend Welcome Day in its entirety or simply attend the benefits portion (registration is still required).

  ☐ Designated time for the new employee to review and sign up for benefits, if eligible.

  ☐ One-on-one or small group meetings with other team members. During these meetings, team members might describe their work and how it integrates with work of the new team member.

  ☐ One-on-one meetings with you to discuss job description, performance expectations, appropriate attire, time and leave, etc.

  ☐ Time alone at their workstation so they can digest all the new information and make notes about what they've learned in meetings.

  ☐ Tour of campus or larger work environment.

NEW EMPLOYEE CHECKLIST

TO BE FILED IN YOUR UNIT PERSONNEL FILE

EMPLOYEE _____ SCHOOL/VP AREA _____

SUPERVISOR _____ DEPARTMENT _____

ACTION ITEMS FOR EMPLOYEE

☐ Find out your Employee Identification Number (EID):_____

☐ Find out your Employment Program:_____

☐ Complete your Affirmative Action Data in Workday: **wd5.myworkday.com/uw/d/home.htmld**

☐ **Benefits-eligible staff on Seattle campus:** Sign up for Welcome Day in-person orientation:
admin.uw.edu/pod/Course/Details/WDAY1

☐ Faculty on the Seattle campus and employees with the medical centers, UW Bothell and
UW Tacoma should attend the orientations hosted by their organizations; those employees
may attend Welcome Day in its entirety or simply attend the benefits portion (registration is
still required).

☐ Welcome Day orientation scheduled for _____ *(enroll in benefits within 31 days of start date)*

☐ Register for Prevention of Sexual Harassment, Violence Prevention and Response,
Reporting Suspected Child Abuse or Neglect, and Asbestos Awareness trainings:
hr.uw.edu/ops/hiring/required-employee-training

☐ Order University business cards *(if applicable)*

INFORMATION COVERED IN WELCOME DAY ORIENTATION

• UW organizational overview, including mission, vision, culture, values and goals

• Key policies and procedures, including working for a state university, and computer,
email and internet usage

• Workplace health and safety

• Human Resources, including WorkLife and Professional & Organizational Development

• UW benefits options and deadlines, Husky advantages and employee amenities

TOPICS TO BE COVERED BY DEPARTMENT/SUPERVISOR

SUPERVISORS: Check off items as you address them with your new employee. For a comprehensive list of items that you/your unit are responsible for, visit this web page and choose "New Hire Checklist": **hr.uw.edu/forms**

- ☐ Terms of employment (employment program/probationary period/salary)
- ☐ Job duties and performance expectations
- ☐ Performance appraisals
- ☐ Work schedules, breaks and overtime
- ☐ Labor contract/dues obligation *(if applicable)* or Professional Staff Program for professional staff
- ☐ Paydays and how to arrange direct deposit
- ☐ Time and time off reporting:
  - ☐ Workday
  - ☐ Types of leave and accrual rates
  - ☐ Requesting time off
- ☐ Function of unit/organizational chart
- ☐ Interrelationships with other units
- ☐ Building use and access/security
- ☐ Departmental Safety Plan
- ☐ Equipment use and access
- ☐ Reference Station Location
- ☐ Telephone use/etiquette/voicemail/directory
- ☐ Email account and usage tips
- ☐ Emergency contact information
- ☐ Inclement weather procedures/polices

_____   _____
EMPLOYEE SIGNATURE   DATE

_____   _____
SUPERVISOR SIGNATURE   DATE

MENTOR CHECKLIST

BEFORE NEW TEAM MEMBER STARTS

- ☐ Make sure their work space is clean and complete, including computer, phone, trash can, etc.
- ☐ Obtain email address from payroll coordinator
- ☐ Set up mailbox
- ☐ Get copy of unit handbook (if applicable)
- ☐ Arrange for any welcoming items or events (door sign, welcome reception, etc.)

WEEK ONE

- ☐ Meet, greet on day one
- ☐ Tour key areas of facility
- ☐ Show work space/desk
- ☐ Introduce new staff member to Workday
- ☐ Introduce new staff member at meetings, breaks, lunch, etc.
- ☐ Review UW communication vehicles
- ☐ Explain regular hours, break times
- ☐ Paydays are 10th and 25th of each month; direct deposit is encouraged
- ☐ Set up email
- ☐ Set up phones and voicemail
- ☐ Have lunch with new staff member
- ☐ Explain use of kitchen facilities and guidelines
- ☐ Fire alarm and evacuation procedure
- ☐ Review and clarify all appropriate safety procedures
- ☐ Review "Table of Contents" of unit handbook (if applicable); encourage new staff member to read at later time
- ☐ Review office equipment (copier, fax machine, etc.) and ordering of supplies
- ☐ Provide a list of acronyms typically used in your unit

DURING THE REMAINDER OF MONTH ONE

☐ Schedule a 15-minute meeting once a week with new staff member to check in

☐ Review what has already been covered in the above checklist

MONTH TWO

☐ Continue to hold weekly meetings, reviewing what has already been covered and adding new topics if needed

☐ Inform staff member of unit business and social events; make sure staff member knows if family is welcome

☐ Remind staff member of advantages of working at the UW, such as discounts/perks, IMA membership, cultural events, diversity resources and Faculty and Staff Affinity Groups (**washington.edu/diversity/staffdiv**)

MONTH THREE

☐ Continue to hold meetings at least every other week

AT THE END OF SIX MONTHS (EVALUATION/TRIAL PERIOD, IF APPLICABLE)

☐ If/when the new staff member successfully completes trial period, ensure that this gets announced at the next staff meeting

☐ Mentor relationship may continue informally as desired or needed

MANAGER'S ONBOARDING TO-DO LIST

DURING THE FIRST 30–60 DAYS

☐ Ensure that you have arranged for proper training for your new staff member

Topics include:

    ☐ Workday and the Integrated Service Center

    ☐ Phones

    ☐ Computer hardware and software

    ☐ Administrative computing systems

    ☐ Unit processes for getting work done

☐ Schedule regular meetings throughout the first several months

☐ Include meetings to check in on employee separate from day-to-day work

DURING THE FIRST SIX MONTHS TO ONE YEAR

☐ Regularly meet with new staff member:

    ☐ Set goals

    ☐ Review performance

    ☐ Give feedback

    ☐ Ask for feedback

☐ Discuss professional development opportunities

☐ Conduct evaluation period/trial period formal review, if applicable

☐ Encourage your new team member to get involved in the UW community. Tell them about the **Faculty & Staff Insider website** and weekly UW Insider emails, which provide information on making the most of their UW employment. Suggest that they talk to colleagues about campus groups and professional activities and resources that might be of interest. **The Whole U** is a great resource for new staff to create connections and engage their interests.

NEW EMPLOYEE CHECK–IN MEETING QUESTIONS

NAME _____ TODAY'S DATE _____

POSITION_____ START DATE _____

How is your job going? What are the highlights of your experiences so far?

_____

_____

Is this role what you thought it would be?

_____

_____

What surprised you during your first few months on the job?

_____

_____

How do you see your job relating to the University's mission?

_____

_____

Has the onboarding process been helpful?

_____

_____

What improvements would you like to see in our unit onboarding process?

_____

_____

Was your in-person Welcome Day Orientation helpful? Is everything okay with your benefits?

_____

_____

Was the online ONE UW orientation helpful?

_____

_____

Do you have all the work tools you need?

_____

_____

Do you have enough, too much, or too little time to do your work?

_____

_____

How are your relationships with your co-workers?

_____

_____

When you have questions at work, who do you talk to? Do you feel comfortable asking questions?

_____

_____

Do you believe your ideas are valued? Can you give examples?

_____

_____

Is there something we should be providing that we are not?

_____

_____

Is there anything you need that you don't have access to?

_____

_____

Is there anything you feel "out-of-the-loop" about?

_____

_____

How can I help you succeed?

_____

_____

Is there anything you would like to tell me that I have not asked about?

_____

_____

Source: Adapted from "20 Questions With Connie," generously provided by Northeast Delta Dental, winner of Fourth Best Company to Work for in America and Business NH Magazine's Best Company to Work for Hall of Fame.

Adapted from HR Specialist: HR Answers You Can Trust. (2017). Onboarding: 15 questions to ask employees in their first 60 days. Retrieved from http://www.thehrspecialist.com/2751/15_questions_to_ask_employees_in_their_first_60_days.hr?cat=tools&sub_cat=memos_to_managers

Adapted from Forbes Communications Council (2016, December 28). Seven Questions to Ask Your New Hire After Three Months. Forbes. Retrieved from https://www.forbes.com/sites/forbescommunicationscouncil/2016/12/28/seven-questions-to-ask-your-new-hire-after-three-months/#5b182248d66a

NEW EMPLOYEE SUCCESS PROFILE

NAME _____ TODAY'S DATE _____

POSITION_____ START DATE _____

▶ POSITION SPECIFIC COMPETENCIES

1. _____

2. _____

3. _____

4. _____

(Use additional pages if there are more than four competencies to focus on in the first 90 days.)

FIRST 30 DAYS

Success looks like...*(what will employee have learned or done?)*

I or others will help our new employee achieve success by...

FIRST 60 DAYS

Success looks like...*(what will employee have learned or done?)*

I or others will help our new employee achieve success by...

FIRST 90 DAYS

Success looks like...*(what will employee have learned or done?)*

I or others will help our new employee achieve success by...

ADDITIONAL GOALS AND TRAINING

Other goals for the new employee include...

I or others will help our new employee achieve success with these goals by...

Specific training needs or action plans to achieve the goals are...

▶ Both the new employee and manager should initial and date this form.
   Keep form in unit personnel file.

	30 Days	60 Days	90 Days
Manager Initials	_____	_____	_____
Employee Initials	_____	_____	_____
Date	_____	_____	_____

RECOGNITION PROFILE

Please complete this form to tell us about you. Share only what you are comfortable with.

NAME _____ TODAY'S DATE _____

POSITION_____ START DATE _____

BIRTHDAY (M/D) _____

▶ FAVORITES

Beverage _____

Book/Author _____

Color _____

Food _____

Hobby/Sport/Interest _____

Movie _____

Restaurant _____

Salty Munchie _____

Sugary Munchie _____

Sports Team _____

Type of Music/Artist _____

Most Avoided Foods _____

Family _____

My Hero _____

Pets _____

Collectables _____

What are your personal goals (educational, travel, home-related, etc.)?

What type of recognition or praise do you like best (public, private, written, verbal, formal)?
What types of recognition have been most meaningful to you in the past?

What form of recognition motivates you the most (gift card, time off, candy, notes, flexibility)?

ONBOARDING MISTAKES TO AVOID

You want your new employee to feel comfortable and be excited about their new job. So why is it that organizations often act in ways that create the opposite result? Here are the top ways to guarantee your new employee will start off on the wrong foot.

AVOID THESE:

- Don't assign a work area. (Let them sit in a hall or share a cube.)

- Schedule the new employee to start work while their supervisor is on vacation.

- Leave the new employee standing in the company reception area for a half-hour while reception staff try to figure out what to do with them.

- Abandon the new employee at their work station to manage on their own while co-workers pair up and head out to lunch.

- Provide an hour in a noisy lobby for the new employee to read and sign-off on a 100-page Employee Handbook.

- Show the new employee their office and don't introduce them to co-workers or assign them a mentor.

- Assign the new employee to a staff person who has a major, career-impacting deadline in three days.

- Give the employee "busy work" that has nothing to do with their core job description, because you are having a busy week.

Source: Adapted from *Top Ways to Turn off a New Employee* by Susan M Heathfield, humanresources.about.com